

“CPA Inprotech is at the core of our practice giving us the ability to provide an efficient service.”

Spruson & Ferguson



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## With CPA, you get more than the world's leading IP service provider. You also get one of the leading software solutions for IP attorneys.

CPA Software Solutions is one of the largest software businesses in the IP market, we employ over 90 people and support software systems implemented in over 300 client sites across 20 nations.

Keeping pace with technological developments is always a challenge, and finding the best software solution is no exception. As an IP attorney you need an advanced, secure, flexible and configurable management system that meets both your current and future software requirements.

Our suite of IP software – CPA Inprotech – is specifically designed for IP attorney firms and is an integrated solution that assists in the management of your entire business. Its modular approach means even the smallest firm can take advantage of the system and have the option to grow into full functionality when required.

CPA Inprotech is the most advanced, most automated, most versatile and most configurable IP solution available. You can be absolutely confident it will help you to manage the lifecycle of your clients patents, designs and trademarks efficiently, effectively and securely. Its technology uses the power of Client Server processing while its web functionality extends the reach of the system for use when out of the office.

It's easy to change to CPA Inprotech. Our highly-trained teams of IP software specialists and project managers carry out the installation of the software quickly and efficiently. They also provide specialised training and vital on-going support.

It's why choosing CPA Inprotech as your IP software solution is the intelligent decision.

## CPA Inprotech – providing the complete IP management solution

CPA Inprotech's core capabilities – referred to as case and name module – provides:

- The fundamental databases
- The capability to manage all case types and all types of IP
- Automatic calculation of due dates and reminders
- The capability to manage the necessary formalities and generate standard documents and invoices and word processing integration
- Foreign language support, including Chinese and Cyrillic characters

The system's modular options include:

### *Fee Generation & Fees List Module*

Provides the capability to register scale fees as well as official and other disbursements.

### *Reciprocity & Statistic Module*

Sophisticated graphical analysis of work performed for and by foreign agents.

### *Timesheet Module*

Ability to capture time in either an on-line or batch manner. Facilities include a task timer, multiple level interrupt, notes for litigation support and separate billing narration.

### *Billing Module*

Provides the ability to record and monitor items of work to be billed and draft bills on-line based on the work in progress available for a case.

### *Quotation Module*

Provides the capability to draft and monitor fixed price quotations for client work.

### *Accounts Receivable Module*

Records collections of cash, including foreign exchange currency, bank accounts, calculation of exchange gain/loss. Also, reconciliation for mixed currency transactions, management of outstanding debt and product summaries of financial information for any period.

### *Contact Management Module*

Records and tracks inbound and outbound correspondence and meeting notes and supports direct marketing activities.

### *Financial Interface Module*

Automatically generates ledger journals that integrate with third party financial systems.

### *Cost Tracking Module*

Collects and evaluates information about the cost of managing IP.

### *File Tracking Module*

Track paper files using bar code technology and can store multiple cases in one file or split larger files into multiple parts.

### *Professional Workbench*

A single entry point to information for staff dealing with a case on a professional level. Central access to all information related to the case stored on management systems.

### *Client Workbench*

This allows greater flexibility in enquiry and reporting for clients, and the ability to pass instructions electronically to the firm via the Internet. Enables query and reporting on portfolios, extraction of information for use with other tools, provision of instructions to the firm, revision of client to do lists, costs, work in progress, debt and invoices.

The workbenches allow for the provision of functionality in a browser based user interface and further extension of the existing systems architecture to cater for tailored views and the transfer of information between industry participants.



### **Flexible**

CPA Inprotech is a completely integrated solution for all types of intellectual property and is ideal for any size of practice. Its modular approach also means it is configurable and can integrate fully with your current systems – from automating the front and back office to servicing the fee earners, your clients and managing the firm.

### **Speed and efficiency**

CPA Inprotech's automated capabilities dramatically speed up clerical procedures. Since installing CPA Inprotech, one IP attorney firm has increased average hours billed by 38 per cent. Invoicing time has reduced from two weeks to just one hour. It has also experienced a 28 per cent increase in collections of invoiced work and a 67 per cent decrease in outstanding invoice balances.

### **Enhanced client service**

Client demands can be many and varied, CPA Inprotech can cope with them. It can indicate what type of reminders should be sent and when, who should receive copies of correspondence and debit notes – even how many copies should be sent. Cases can be defined by business or legislative requirements. It enables you to offer a full service solution as it has an automatic two-way interface to CPA's renewals service.

As well as being able to manage virtually any client requirements, it can also automatically handle multiple sets of requirements. CPA Inprotech's *Billing Module* can also produce single case bills, multiple case bills, and split bills for multiple clients. The actual bill itself can be tailored to meet each individual clients currency, language and formatting requirements.

### **CPA Inprotech streamlines...**

With CPA Inprotech, case and name information is accessed from one central source, including related cases, documents, work in progress and due dates, so as well as streamlining all clerical procedures, there's a significant improvement in staff efficiency and output. CPA Inprotech has the capability to search using virtually any criteria in any combination – and you can integrate with other applications, including spreadsheets, word processors and e-mail.

### **...automates**

Instead of relying on a high degree of user knowledge and experience to activate various complicated clerical tasks, configurable workflow wizards exactly match your docketing and case management operations. Documents, letters and debit notes are produced automatically and in the client's

preferred language(s) – all you have to do is sign them. And with automation comes speed – a letter to a client, IP office, file cover and debit note are automatically generated within seconds of receiving an instruction, while hundreds of letters can be generated an hour – with no manual input.

Variable billing information is easily dealt with using checklists. For example, when you record that an application has been filed, CPA Inprotech can be configured to ask you how many pages there are in the patent specification and raise an invoice based on your charges.

### **...and anticipates**

CPA Inprotech is proactive. When a new case is added, only relevant screens and fields appear. It calculates due dates and when letters/reminders need to be produced, how to address them and to which staff/departments and clients they are to be sent. It will calculate which forms need to be generated and work out what invoices and official fees are to be generated, and when – all without manual intervention.

## Changing to CPA is easy.

Changing to entirely new software is not a decision to be taken lightly. However, with CPA, our highly-trained teams of IP software specialists and project managers oversee the seamless integration of CPA Inprotech into your practice.

Whether you're changing from in-house systems or from another IP software provider, we are experts in converting data from a range of systems and a variety of platforms. Our teams also have a wealth of experience in providing configurable solutions to meet your requirements.

Remember that all CPA software products include a comprehensive two-way interface to the CPA patent and trademark renewals services, providing you with a seamless and secure method of transferring data.

### **Extensive support services**

Once your system is installed, we provide a dedicated training course and vital on-going support. Both are backed by service level agreements.

### **Intelligent IP software solutions going forward**

We believe CPA Inprotech to be the most advanced, most innovative and most configurable IP software solution for IP attorneys available anywhere. Yet we're far from complacent.

As the world's leading IP service provider, CPA is constantly evolving to stay ahead of the competition – in what we say, do and deliver. We tirelessly review our internal systems and procedures to enable us to provide you with a first-class, cost-effective service.

The same holds true for CPA Inprotech. Drawing on feedback from clients, our software is continually being developed to anticipate your requirements and keep pace with changes in technology. CPA Inprotech's modular approach is also regularly extended with new features and functions for specific tasks.

Indeed, CPA Inprotech embodies the 'intelligent' approach we bring to all our products and services, where IP expertise and IT specialists work together with the latest technology to deliver the best solution possible.

There has never been a better time to find out how CPA Inprotech can revolutionise the service you provide to your clients. Choosing CPA Inprotech is the truly intelligent decision.



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